

United States Department of State

Department Notice

Office of Origin: HR/RET
Announcement Number: 2005_03_050
Date of Announcement: March 11, 2005

Timely Submission of Retirement Application

Retirement is a life event and involves careful early planning and preparation for employees and the Office of Retirement. The following are helpful tips for a smooth retirement process:

Submitting Retirement Application

If overseas - 6 to 8 months prior to effective date of retirement, earlier if you are sure of a retirement date.

If domestic - 3 to 6 months prior to effective date of retirement, earlier if you are sure of a retirement date.

Whether overseas or domestic, there are practical processing deadlines:
Retirement September 29, 2005 -- Application Deadline: June 30, 2005
Retirement December 31, 2005 -- Application Deadline: Sept. 30, 2005

Retirement Application

SF-2801 (CSRS)

SF-3107 (FERS)

DS-5004 (FSRDS & FSPS)

Foreign Service employees also need to complete the OF-126, Foreign Service Residence & Dependency Report, along with the DS-5004.

Retirement Applications are available on the Intranet.

Our Best Advice

1) *Avoid Delays in Your Annuity Payment by Careful Planning*

The Office of Retirement will do everything possible to ensure a smooth transition to retirement. One of the major problems that does occur stems from late submission of retirement applications. Retirement is based on documentation in the OPF and the OPF must be reviewed as part of the retirement processing. Time must be allowed to

address any issues that might appear. We would offer two areas of advice to employees: a) take a look at your OPF before you start the retirement process, it is better for you to identify any concerns rather than have those emerge as part of the retirement processing and b) please start the process early enough so that any issues can be addressed and so that your annuity payment is not delayed.

2) *Take Care of Prior Service Credit Now*

Creditable service in the military, Peace Corps or other Federal employment can and should be addressed long before retirement. Requests are made to the Office of Retirement based on information in the Official Personnel Folder. If you wait until retirement to do this, there will be two problems: 1) your retirement processing will be delayed and 2) it will cost you more. Three Retirement Counselors in HR/RET are responsible for Prior Service Credit.

Who Does What?

Foreign Service: Retirement applications must be submitted to your Retirement Counselor in the Office of Retirement.

Civil Service: Retirement applications must be submitted to your Human Resources Specialist in your Executive Office.

Counseling Services: The Office of Retirement provides counseling services to all Department of State employees (Civil Service and Foreign Service). Employees are encouraged to take advantage of this service to avoid any last minute issues involving their retirement.

For further guidance on timely submission of your retirement application, please contact the Office of Retirement by phone at (202) 261-8960 or via email at retirement@state.gov.

Also visit our office at Columbia Plaza, SA-1, Room H-620 or visit our website at <http://hrweb.hr.state.gov/ret/Index.html>. At the website we ask you to carefully review the FAQs before contacting us since most questions are already answered there. If your question is not there, please e-mail us for a response.